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ABSTRACT

The author provides a macroview of the educational linking agent from the perspective of the National Institute of Education (NIE) and discusses the learning emerging from the Research and Development Utilization (RDU) Program of NIE concerning the uses of linking agents. The growth of NIE interest in the linking agent role is discussed. Differences in linking agent environments among projects in the RDU program are illustrated, and a composite of the RDU linker role is presented. RDU program participants' descriptions of the linker role and linking agents' perceptions of their concerns and problems are also discussed. NIE early conclusions are that (1) most of the linkers are performing a critical role with reasonable success; (2) most participant schools have identified problem areas and selected promising programs; (3) some schools have actually implemented suggested solutions; (4) linkers need constant reinforcement due to their isolated positions; and (5) better training techniques for linkers are needed. (BJB)

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"The Linking Agent in Research Utilization; Linking Agents From the Perspective of the National Institute of Education." Presentation at AERA Annual Meeting Toronto, Canada, March 27, 1978

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NATIONAL INSTITUTE OF EDUCATION

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We at NIE welcome the opportunity to participate in this latest of a growing number of dialogues about the role of the linking agent in education, and, more specifically, in research utilization. The RFP which initiated the R&D Utilization effort set forth two broad program objectives: first, an increase in the usefulness of R&D outcomes to local practitioners in solving locally-defined problems; and second, achievement of a better understanding of dissemination methods and techniques that increase the likelihood that R&D outcomes will be considered by practitioners. The RFP stressed that projects were expected to go beyond the mere dissemination of information about R&D outcomes to provide necessary support for adoption/adaption activities. Further, it was clearly stated that local needs must dominate the decision process, and, although an assumption was made that R&D outcomes were viable tools for program improvement, a legitimate project outcome <u>could</u> be the conclusion that there was no R&D outcome which represented

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AN ACCEPTABLE SOLUTION TO THE DEFINED PROBLEM. WE FELT THAT SUCH A CONCLUSION PROPERLY DOCUMENTED, WOULD ADD TO THE INSTITUTE'S UNDERSTANDING OF FIELD REQUIREMENTS FOR FURTHER R&D.

WITH A LITTLE FORESIGHT, HOWEVER, WE COULD HAVE MADE IT MORE CLEAR THAT THE SYSTEMATIC PROBLEM-SOLVING STRATEGY SPECIFIED IN THE RFP WAS EXPECTED TO PRODUCE VALUABLE INFORMATION ABOUT THE DYNAMICS OF CHANGE WITHIN SCHOOLS AND ESPECIALLY ABOUT THE TYPES OF SUPPORT THAT ARE MOST USEFUL TO LOCAL PRACTITIONERS AS PART OF IMPROVEMENT EFFORTS. THE RFP INDICATED THAT A SPECIFIC STRATEGY TO BE DEMONSTRATED BY PROJECTS WAS HOW AGENCIES COULD BE LINKED TOGETHER TO SUPPORT LOCAL SCHOOLS IN THEIR PROBLEM-SOLVING EFFORTS. ALTHOUGH THE TERM "LINKING AGENTS" WAS NOT USED OR EVEN ALLUDED TO IN THE RFP, OBVIOUSLY SOME PERSON OR PERSONS HAD TO BE THE BRIDGE BETWEEN THESE SUPPORTING AGENCIES AND THE LOCAL SCHOOLS. THE SEVEN WINNING PROPOSALS EACH HAD A VERSION OF WHAT, TODAY, WE ARE GENERICALLY CALLING "LINKING AGENTS."

WE ARE NOW WELL INTO THE SECOND SCHOOL YEAR OF A PLANNED THREE YEAR ACTION/RESEARCH PROGRAM. THERE IS THE <u>POSSIBILITY</u> THAT SOME OF THE ACTION <u>AND</u> THE RESEARCH WILL BE EXTENDED BEYOND THE THIRD YEAR TO ENHANCE THE IMPACT AND THE LEARNING FROM THE PROGRAM. THE PROGRAM IS

DIRECTLY SERVING ABOUT 230 SCHOOL ENTITIES, MOST OF THEM ENTIRE FACULTIES OF A SINGLE SCHOOL BUILDING, BUT IN SOME CASES ALL SCHOOLS IN SMALL RURAL SCHOOL DISTRICTS ARE BEING SERVED. IN A FEW OTHER INSTANCES, ONLY A PROTION OF A FACULTY SUCH AS A SECONDARY SCHOOL ENGLISH OR MATH DEPARTMENT IS BEING ASSISTED. WE KNOW THAT THE PROGRAM'S INFLUENCE HAS ALREADY IMPACTED ADJACENT SCHOOLS IN A NUMBER OF INSTANCES.

ALTHOUGH WE COUNT MORE THAN 100 PERSONS UNDER THE GENERAL RUBRIC OF "LINKING AGENT" IN THE RDU PROGRAM, FOR PURPOSES OF INDEPTH DOCUMENTATION, WE HAVE REDUCED THE NUMBER OF LINKING AGENTS BEING STUDIED CLOSELY TO SLIGHTLY MORE THAN FIFTY. THERE IS A TREMENDOUS VARIATION BETWEEN THE SEVERAL PROJECTS IN TERMS OF LINKER TIME SPENT ON PROJECT, NUMBER OF SCHOOLS SERVED BY EACH LINKER, SUPPORT PROVIDED TO THE LINKERS, STRATEGIES USED BY LINKERS, TRAINING PROVIDED TO THEM, AND A HOST OF OTHER VARIABLES. THIS NATURAL VARIATION OBVIOUSLY PRESENTS AN ENORMOUS CHALLENGE TO ANYONE TRYING TO DRAW CONCLUSIONS ACROSS THE SEVEN PROJECTS.

SOME OF THE DIFFERENCES IN LINKING AGENT ENVIRONMENT BETWEEN PROJECTS CAN BE BRIEFLY ILLUSTRATED: (1) LINKER TIME ALLOCATED TO RDU ACTIVITIES IS 100 PERCENT IN THREE PROJECTS, FROM 50 TO 80 PERCENT IN TWO OTHERS, AND ABOUT 15 PERCENT IN ANOTHER. IN THE SEVENTH PROJECT, RDU LINKER RESPONSIBILITIES ARE AN ADD-ON TASK, AND PROJECT FUNDS ARE

USED ESSENTIALLY TO REIMBURSE LINKERS FOR ADDED EXPENSES OF PROJECT SUPPORT; (2) LINKERS ASSIST ONLY ONE SCHOOL IN ONE PROJECT, BUT FROM 4-6 SCHOOLS EACH IN ALL OTHER PROJECTS; (3) THE LINKER HOME BASE VARIES FROM SEAs AND STATE TEACHER ASSOCIATIONS IN ONE PROJECT, TO A VARIETY OF INTERMEDIATE SERVICE AGENCIES IN MOST OTHERS INCLUDING TEACHER EDUCATION CENTERS AND UNIVERSITIES; (4) THE SUPPORT RECEIVED FROM THE HOME BASE APPEARS TO BE MAINLY LOGISTICAL, ALTHOUGH THERE ARE CASES WHERE SUPPORT IS VERY SUBSTANTIVE AND EVEN CONTENT ORIENTED. HOWEVER, AT THE PRESENT TIME, MOST SUBSTANTIVE SUPPORT APPEARS TO BE COMING FROM THE SEVEN CENTRAL PROJECT OFFICES; (5) THE PROFESSIONAL BACKGROUND OF THE LINKERS VARIES WIDELY. WE HOPE THE RESEARCH EFFORT WILL PINPOINT SOME OF THE CRITICAL CHARACTERISTICS WHICH MAKE A SUCCESSFUL LINKER; (6) THE TRAINING PROVIDED TO LINKERS HAS ALSO VARIED WIDELY BOTH AS TO TYPE AND VALUE. WE ARE ATTEMPTING TO PINPOINT THOSE TRAINING ACTIVITIES WHICH LINKERS HAVE FOUND MOST USEFUL.

TWO OTHER BITS OF INFORMATION MAY BE USEFUL AT THIS POINT. FIRST, THE NEWNESS OF THIS ENTIRE EFFORT SHOULD BE EMPHASIZED. MOST LINKERS WERE NEW TO THEIR ROLE, AND THERE WERE NO REAL ROLE MODELS TO STUDY SINCE THE DEGREE OF INTERVENTION WHICH THE PROGRAM CALLED FOR WAS UNPRECEDENTED. THERE WAS A STEEP FIRST YEAR LEARNING CURVE AND MOST LINKER LEARNING WAS ON THE JOB. IN MANY CASES, LINKERS NOT ONLY

HAD TO LEARN THEIR JOBS BUT ALSO HAD TO ORIENT THEMSELVES TO THE COMPLEX ENVIRONMENT OF THE SCHOOLS THEY HOPED TO ASSIST. IN ADDITION, IN ALMOST ALL CASES, THEY HAD TO BECOME ACQUAINTED WITH THE RESOURCE BASE OF R&D OUTCOMES IN ORDER TO HELP THE SCHOOLS SCREEN POSSIBLE SOLUTIONS TO THE LOCALLY IDENTIFIED PROBLEM.

SECOND, AS IF THE ABOVE WERE NOT ENOUGH ADJUSTMENT, THE LINKERS IN MOST PROJECTS WERE ALSO EXPECTED TO PLAY AN IMPORTANT ROLE IN DATA COLLECTION AND DOCUMENTATION FOR THE RESEARCH ASPECT OF THE RDU PROGRAM. DEPENDING ON HOW THE PROJECT ORGANIZED ITSELF FOR THIS EFFORT, SUPPORT OF RESEARCH MAY CONSUME AS MUCH AS 25-30 PERCENT OF A LINKER'S TIME.

WHAT KIND OF SERVICES ARE LINKERS PERFORMING? A COMPOSITE OF AN RDU LINKER WOULD PRODUCE THE FOLLOWING SET OF ROLES:

> MEETING SCHEDULER (FREQUENTLY INVOLVING COMPLEX LOGISTICS); PROCESS FACILITATOR (TO KEEP TEAM MEMBERS ON TASK); PROGRAM INTERPRETER (OF PROJECT GOALS AND STRATEGIES); MORALE BUILDER (TO KEEP FACULTIES GOING WHEN THEY GET DISCOURAGED); RDU PROGRAM ADVOCATE (OF REASONABLE ADHERENCE TO PROJECT STRATEGIES); IDENTIFIER OF R&D SOLUTIONS (ONCE DECISION CRITERIA HAVE BEEN SET); RESOURCE SPECIALIST (TO LOCATE TRAINING ASSISTANCE OR OTHER RESOURCES FOR FACULTIES); CURRICULUM CONTENT SPECIALIST (OCCASIONALLY, BUT NOT TYPICALLY); LOCAL

DECISION SECRETARY; ADVISOR TO LEA SCHOOL ADMINISTRATION, PROJECT DOCUMENTER.

HOW HAVE VARIOUS RDU PROGRAM PARTICIPANTS DESCRIBED THE LINKER'S ROLE? THE FOLLOWING ARE EXCERPTS FROM RECENT INTERVIEWS:

- PROJECT OFFICE PEOPLE DESCRIBED THE LINKER AS TAKING A FAIRLY ACTIVE, ASSERTIVE STANCE--SOMEONE WITH EXPERTISE WHO WAS WILLING TO SHARE IT. LINKERS ARE SUPPOSED TO INFLUENCE THE CLIENT SYSTEM. THEY ARE TO SERVE AS ACTIVE MANAGERS OF A COMPREHENSIVE CHANGE PROCESS. THEY ARE TO SUPPLY PROCESS ASSISTANCE, SOME CONTENT EXPERTISE, AND GENERAL MANAGEMENT CAPABILITY.

- SCHOOL DISTRICT STAFF SEE THE LINKER ROLE AS ONE OF COORDINATING, CONTROLLING, KEEPING THINGS ON TRACK, WHILE "GIVING US A CHOICE" AND "DRAWING OUT OUR IDEAS."

- VIEWING HER ROLES AS THAT OF "A PROCESS HELPER," THE LINKER FELT SHE SHOULD BE "AN OD STRATEGIST," "AN INTERVIEWER," BUT NOT A PROVOCATEUR." SHE BELIEVES THAT A LINKER SHOULD "BUILD CAPACITY IN A SCHOOL DISTRICT, NOT STIR THEM UP."

- BECAUSE SHE (THE LINKER) "WORKS WITH DISTRICTS WHERE THEY ARE," THE NUMBER OF CONTACTS--VISITS, PHONE CALLS, WRITTEN COMMUNICATIONS--WILL VARY WIDELY FROM SCHOOL TO SCHOOL. SOME, SHE "PRODS" WITH PHONE CALLS

AND LETTERS; OTHERS SHE FEELS COMFORTABLE WITH, EVEN THOUGH SHE DOES NOT HEAR FROM THEM, BECAUSE SHE KNOWS THEY KNOW WHAT THEY ARE DOING.

- o BASED UPON THE NEEDS OF THE SITE, THE LINKER HAS ASSISTED IN DEVELOPING A PLANNING PROPOSAL, HELPED THE SCHOOL SET UP ITS PROJECT TEAM, PROVIDED OUTSIDE CONSULTANT HELP, CONDUCTED A WORKSHOP ON GROUP PROCESSES, ARRANGED FOR A TRAINING SESSION, SHARED MATERIALS AND INFORMATION, OR SIMPLY "SAT IN ON THEIR MEETINGS."

WHAT CONCERNS AND PROBLEMS DO THE LINKERS THEMSELVES HAVE? THEY INCLUDE:

- BEING SPREAD TOO THIN TO DO THE MOST EFFECTIVE JOB
- DOCUMENTATION RESPONSIBILITIES ARE SEEN AS A CONFLICT ROLE
- LEA RESISTANCE TO FEDERAL PROJECTS IS A HANDICAP
- LACK OF SUFFICIENT BACKUP BY CONTENT SPECIALISTS
- ROLE CONFUSION: AM I A PROJECT OR AN LEA ADVOCATE?
- ABSENCE OF GOOD LINKER TRAINING PROGRAMS
- LESS CERTAINTY ABOUT THE LINKER'S ROLE DURING ACTUAL IMPLEMENTATION
- WHAT IS THEIR RESPONSIBILITY FOR ASSURING THAT SCHOOL STAFF PROCEED THROUGH THE FOUR STAGE PROBLEM-SOLVING STRATEGY RATHER THAN RUSHING TO PRODUCT SELECTION?

SOME INDIVIDUAL COMMENTS ADD FURTHER PERSPECTIVE:

- ONE PROJECT OFFICE FELT THE LINKER'S PERFORMANCE PROBLEMS WERE: (A) OVER-INVOLVING THEMSELVES WITH SCHOOL SITES' PROBLEMS; (B) EVOLVING A CLEAR UNDERSTANDING OF THEIR ROLE; AND (C) LEARNING TO LIVE PROFESSIONALLY WITH THE "MARGINALITY" OF THEIR LINKAGE ROLE, SERVING AS THEY DO SEVERAL DIFFERENT MASTERS.

- ACCORDING TO ANOTHER PROJECT OFFICE, THE MOST RECENT PROBLEM THE LINKER IS FACED WITH IS WHAT HIS OR HER ROLE SHOULD BE AS SCHOOLS MOVE FROM DEFINING PROBLEMS TO IMPLEMENTING PROGRAMS IN CLASSROOMS. LINKERS ARE CONCERNED ABOUT SUCH THINGS AS WHETHER OR NOT THEY SHOULD OBSERVE IN CLASSROOMS.

- A LINKER INDICATED THAT THE MAIN PROBLEMS WERE: (A) AVOIDING THE URGING OF LOCAL OR DISTRICT ADMINISTRATORS TO "SELL" THIS OR THAT TO TEACHERS; (B) CLARIFYING FOR TEACHERS AND ADMINISTRATORS WHAT THE LINKER COULD OR COULD NOT DO; (C) MAKING CERTAIN THAT LOCAL SITE PERSONS DO NOT BECOME TOO DEPENDENT ON THE LINKER; (D) COPING WITH LOCAL POLITICS; AND (E) COLLECTING REQUIRED DATA WITHOUT BEING PERCEIVED AS AN EVALUATOR.

- ONE LINKER REFERRED TO ONLY TWO BARRIERS: "THE TYPICAL SEA BARRIER" (THE THREAT WHICH STATE DEPARTMENT PEOPLE APPARENTLY FELT FROM THE PROJECT), AND THE LINKER'S PREVIOUS "BAD" EXPERIENCES WITH UNIVERSITY PERSONNEL. HE FELT THAT THEY WERE ONLY INTERESTED IN PROJECTS IN WHICH THEY COULD MAKE MONEY, AND THAT THEY "WANTED TO COME IN AND TAKE OVER."

- A PERSISTENT PROBLEM IN WORKING WITH SCHOOL GROUPS IS THAT THEY "HAVE TO BE SLOWED DOWN." THE TEACHERS ALL WANTED TO SEE CATALOG OF R&D OUTCOMES FIRST. THE LINKER HAD TO CONVINCE THEM THAT HE "WASN'T RUNNING A CAFETERIA (OF PRODUCTS)."

- SPECIFIC ISSUES SHE FACED INCLUDED: (1) HOW MUCH TO GET INTO PERIPHERAL ISSUES SUCH AS STAFF EVALUATION; (2) PRECISELY WHAT SORT OF HELP TO PROVIDE DURING IMPLEMENTATION; AND (3) THE NOVELTY OF THE LINKER ROLE AND THE CONSTANT NEED TO INTERPRET IT TO OTHERS.

- THE LINKER FELT THAT SOME CURRICULUM SPECIALISTS IN THE DISTRICTS WERE THREATENED BY HER PRESENCE. SHE HAD TRIED TO INVOLVE THEM IN THE PROJECT AND HELP THEM DISTINGUISH HER JOB FROM THEIRS.

WHAT HAVE WE LEARNED TO DATE? I CAUTION AT THE OUTSET THAT OUR INFORMATION MUST BE CLASSIFIED AS EARLY RETURNS--FRAGMENTARY AND ANECDOTAL FOR THE MOST PART. WE DO HAVE AN STRONG IMPRESSION, HOWEVER, THAT DESPITE THE "NEWNESS" FACTOR CITED ABOVE, MOST OF THE LINKERS WHO ARE WORKING AT THE TASK FOR A SUBSTANTIAL PORTION OF THEIR DAY ARE PERFORMING A CRITICAL ROLE WITH REASONABLE SUCCESS. A LARGE NUMBER OF SCHOOLS HAVE MOVED THROUGH THE PROBLEM IDENTIFICATION STAGE, HAVE SCREENED POTENTIALLY PROMISING R&D OUTCOMES AND HAVE MADE A SELECTION OF ONE OUTCOME TO INSTALL. A SMALLER BUT SIGNIFICANT NUMBER OF SITES ARE ACTUALLY IMPLEMENTING THE SOLUTION SELECTED. THE PROJECTS HAVE ADVISED US THAT THIS SECOND YEAR HAS PROCEEDED MUCH MORE SMOOTHLY THAN THE FIRST. A FEW SCHOOLS AND A FEW LINKING AGENTS HAVE DROPPED BY THE WAYSIDE, BUT THE NUMBERS ARE SMALL AND WE EXPECT TO LEARN IMPORTANT LESSONS FROM THIS FALLOUT.

THERE ARE ONLY A FEW BROAD GENERALIZATIONS I WOULD BE WILLING TO MAKE AT THIS TIME. FIRST, LINKERS NEED CONSTANT REINFORCEMENT. WE MUST UNDERSTAND HOW ALONE THEY FEEL WHEN WORKING IN SCHOOL DISTRICTS AND DEVISE BETTER SUPPORT SYSTEMS. THE BEST SUPPORT SYSTEM AT THIS POINT SEEMS TO BE INTERFACE WITH FELLOW LINKERS. SECOND, MUCH BETTER TRAINING TECHNIQUES FOR BUDDING LINKERS ARE NEEDED. PREPACKAGED TRAINING MATERIALS HAVE NOT PROVEN OF MUCH VALUE TO LINKERS THUS FAR. THIRD, LINKER INSECURITY SEEM TO BE ACCENTUATED AS A SCHOOL SITE

BEGINS ACTUAL IMPLEMENTATION. LINKER ROLES WERE MUCH CLEARER AT EARLIER STAGES. IT MAY BE THAT LACK OF CONTENT EXPERTISE IS A CRITICAL CONCERN FOR LINKERS WHEN A SITE REACHES THE POINT OF IMPLEMENTATION.

FORTUNATELY, THE RDU STUDY CONTRACTOR, ABT ASSOCIATES, IS BEGINNING A MAJOR STUDY OF RDU LINKING AGENTS TO INCREASE OUR INSIGHTS ON THE POTENTIAL OF THIS ROLE IN PROGRAMS OF MANAGED CHANGE. IN ADDITION, WE HAVE BEEN VERY PLEASED AT THE INTEREST EXPRESSED BY MANY RDU LINKERS IN FURTHER PROFESSIONALIZATION OF THE LINKER ROLE, AND WE HOPE TO BE ABLE TO ENCOURAGE AND SUPPORT THIS INTEREST IN APPROPRIATE WAYS.

IF YOU WILL ALLOW ME A PERSONAL OBSERVATION BY WAY OF CONCLUDING, I WOULD NOTE THE IRONY OF THE CURRENT ECONOMIC PROBLEMS OF MOST PUBLIC SCHOOL SYSTEMS AS IT AFFECTS THE ABILITY OF THOSE SYSTEMS TO RESPOND TO PUBLIC CLAMOR FOR CHANGE AND ACCOUNTABILITY. AT THE VERY TIME EDUCATORS ARE MUCH MORE AWARE OF THE NEED TO BE RESPONSIVE, EXTRAORDINARILY TIGHT BUDGETS ARE SWEEPING AWAY MUCH OF THE SUPPORT BASE WHICH SCHOOL SYSTEMS NEED TO PRODUCE BETTER RESULTS. IT WOULD APPEAR MOST OF THE SUPPORT FOR FUTURE IMPROVEMENTS WILL HAVE TO COME FROM OUTSIDE THE LOCAL SYSTEMS AS THE LATTER CUT BACK TO A BARE MINIMUM PROGRAM.

THE EXTENT OF OUTSIDE SUPPORT THAT CAN BE MARSHALLED TO PROVIDE THE IMPETUS FOR EDUCATIONAL RENEWAL MAY BECOME ONE OF THE MOST CRITICAL ISSUES FACING SCHOOL MANAGERS IN THE NEXT FEW YEARS. IT IS IN THIS LIGHT THAT THE LESSONS WE LEARN FROM PROGRAMS LIKE R&D UTILIZATION MAY BE PARTICULARLY SIGNIFICANT FOR OUR PUBLIC SCHOOLS.